

# Travel & Concur

January 10, 2024

## UWSA Travel Contact

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# Agenda

- Basics of UW Travel program
- Travel & Expense policy
- How to's:
  - Book – Concur or with agents
  - Administrative Groups
  - Combine Business & Personal Travel
- Concur demo
- What's new?
- Resources and Q&A



# Managed Travel Program Goals




- Provide Duty of Care and Travel Risk Management for students, faculty and staff who travel on University business
- Obtain best prices through consolidated spend
- Act as an intermediary with vendors to ensure a smooth travel experience



# Travel Program Overview

- [TravelWise](#) – great resource
- All travel is booked through [designated Agencies](#)
- Concur is an online booking tool that is managed by Travel Incorporated
- Travelers have the option
  - book with a UW specific consultant
  - book in Concur



		
<p><b>Employee Services</b></p> <p>Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW</p> <ul style="list-style-type: none"> <li>• Individual travel (employees, guests, students)</li> <li>• Administrative Groups</li> </ul>	<p><b>University Group Block Services</b></p> <p>Must be used for all groups of 10 or more where:</p> <ul style="list-style-type: none"> <li>• Attendees are flying together on the same flight which requires direct agreements with the airlines to set up</li> </ul>	<p><b>NCAA Athletics Services</b></p> <p>Must be used for all NCAA related travel (individuals and groups)</p>
<p><b>Dedicated Team Business Hours:</b> 7 am CST-8 pm CST Monday-Friday, excluding Holiday</p>	<p><b>Dedicated Team Business Hours:</b> 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>	<p><b>Dedicated Team Business Hours:</b> 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>

Links to information for:

[Travel Incorporated](#)

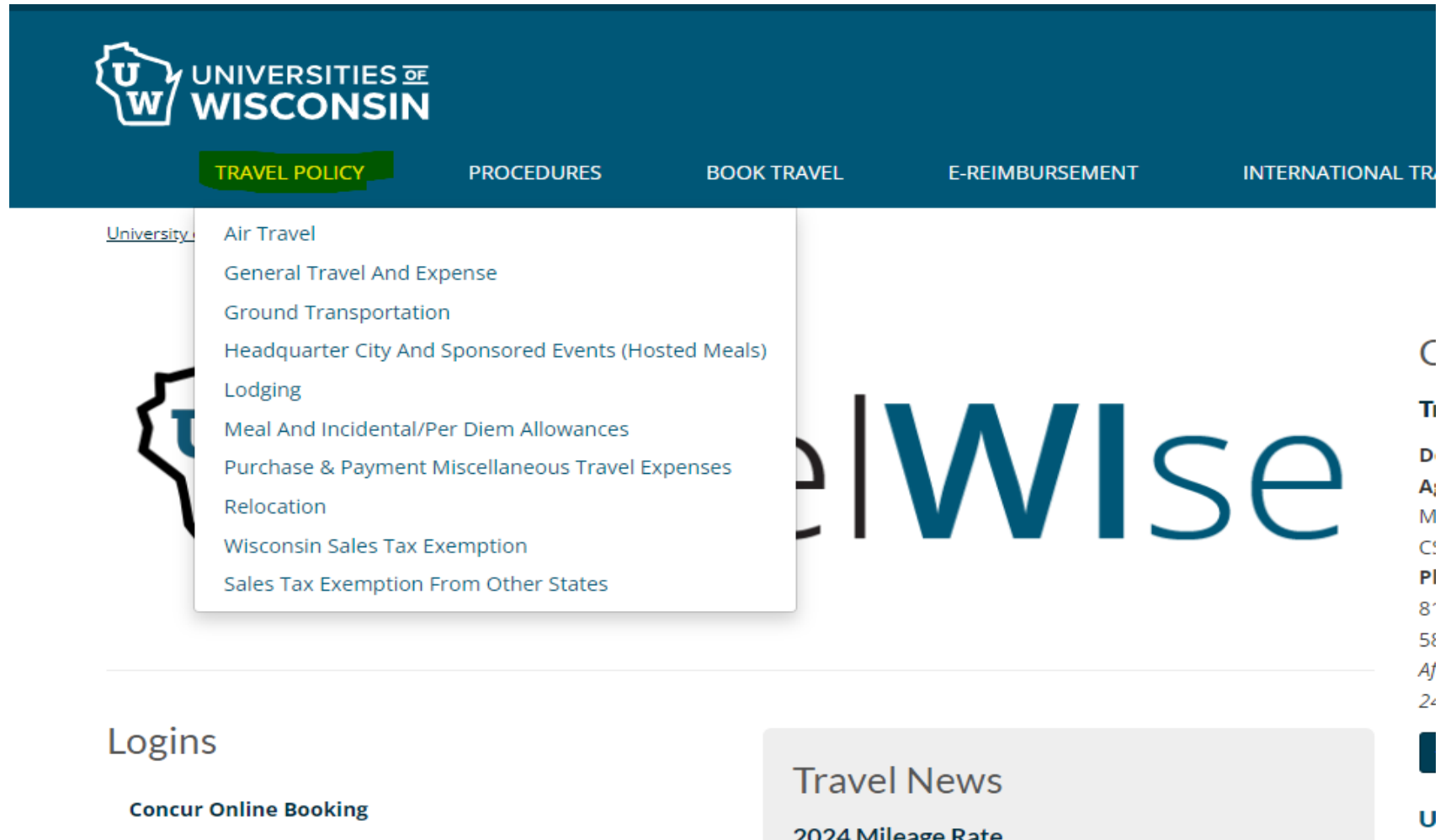
[Fox World Travel](#)

[Shorts Travel Management](#)

# Ways to make travel smoother

- Self-service options encouraged
  - ✓ Use Concur for booking
  - ✓ Use [Travel Inc Hub](#) for personal invoice retrieval
  - ✓ Download mobile apps for airlines, hotels, etc
  - ✓ Register for frequent flyer and hotel loyalty programs
- Utilize Campus Travel Manager for assistance with policy, planning and booking questions
- Reconfirm flights
- Arrive at airport early

# Let's talk about policy



The screenshot shows the University of Wisconsin Travel Policy website. The header is dark blue with the University of Wisconsin logo and the text "UNIVERSITIES OF WISCONSIN". Below the header is a navigation bar with links: "TRAVEL POLICY" (highlighted in green), "PROCEDURES", "BOOK TRAVEL", "E-REIMBURSEMENT", and "INTERNATIONAL TRAVEL". A dropdown menu is open under "TRAVEL POLICY", listing various travel-related topics. The main content area features a large "TravelWise" logo. On the right side, there is a vertical list of links. At the bottom, there are sections for "Logins" and "Travel News".

**UNIVERSITIES OF WISCONSIN**

**TRAVEL POLICY** PROCEDURES BOOK TRAVEL E-REIMBURSEMENT INTERNATIONAL TRAVEL

University of Wisconsin Travel Policy

- Air Travel
- General Travel And Expense
- Ground Transportation
- Headquarter City And Sponsored Events (Hosted Meals)
- Lodging
- Meal And Incidental/Per Diem Allowances
- Purchase & Payment Miscellaneous Travel Expenses
- Relocation
- Wisconsin Sales Tax Exemption
- Sales Tax Exemption From Other States

**TravelWise**

Concur Online Booking

Travel News

2024 Mileage Rate



# Policy Highlights - Air

- Must be booked with Designated Agency or in Concur to receive payment/reimbursement
  - ✓ Booking with third party sites, such as Expedia.com, or directly on airline site is not reimbursable
- Preferred vendors are Delta, ~~American Airlines~~, United, Southwest
  - ✓ Other airlines are allowed to be booked
- Basic Economy fares are not shown on Concur. Must be requested in order to book that fare class



# Policy Highlights - Air

## Notable Travel Policy Exceptions:

- International flights with 8+ hours of consecutive airtime are eligible for Premium Economy seats
- Inter-Country flights purchased outside of the U.S. are exempt from Travel Inc. purchase mandate



# Ghost Card (Central Air Billing) Deactivated 9-1-23

## How is Airfare Now Paid?

- P-card
  - ✓ May be used for individual bookings if traveler is a p-card holder
  - ✓ Arrangers may use their p-cards to book on behalf of employees, students or guests
    - P-card holder must be added as Arranger in Concur to use card for other employees
  - ✓ [Administrative Group](#)
  - ✓ For large transactions, request temporary limit increase (purchasing@uwplatt.edu)
- Personal credit card
  - ✓ May be used for individual bookings
  - ✓ Airfare expense reports can be submitted for reimbursement prior to travel
  - ✓ Should not be used when booking for guests or non-employees

*Direct Charge of Airfare form no longer needed*



# Policy Highlights - Hotel

- Best Practice: book with a Travel Inc consultant or in Concur
  - ✓ Exception: Conference hotels can be booked directly at the rate that the conference dictates.
- Rates must be below the rate maximum, based on per-person
  - ✓ Verify max rate for your location via [Lodging and Per Diem Calculator](#)
- Preferred hotels should be used whenever available

# Policy Highlights - Ground

- Must be an [authorized driver through Risk Management](#) to drive on UW business
- Car Rental Contracts:
  - ✓ Primary - Enterprise/National - Big10 contract
  - ✓ Now also primary - Hertz
  - ✓ Book with a Travel Inc. Consultant or in Concur
  - ✓ Never accept extras such as fuel service, GPS, Roadside Assistance, etc. These are not reimbursable
  - ✓ Traveler is expected to refuel car prior to return –receipts required
  - ✓ Preferred is to book standard, able to book up to full size SUV if needed



# Administrative Groups

- The [Administrative Group process](#) allows a host department to easily manage all department specific travel needs for students, guests or employees. The process allows the group administrator to either:
  - ✓ Securely use a department p-card on file with Travel Inc for agent reservations or;
  - ✓ To set up the group for individual bill, where each traveler provides a personal credit card at the time of booking.

# Administrative Groups

- Setting Up an [Admin Group](#) - Department arrangers must provide the following information and use the Travel Incorporated [UW Group Reservation Request Form](#) to submit the information.
  - ✓ Travel dates/times can be pre-defined (this is not required if not yet known)
  - ✓ Fare allowance
  - ✓ Approval requirements
  - ✓ If you want the card on file to be used for hotel guarantee (hold reservations for traveler's own payment at check-out)
  - ✓ List of authorized users that are eligible to have their charges paid for via the card on file. This list may be modified as needed.
- Once this process is complete, Travel Incorporated will provide the **Administrative Group Code** and contact information that must be given to and referenced by travelers or coordinators when booking under the established Administrative Group.
- **Important Note:** *Set-up can take up to 48 business hours. Not advised if travel needs to take place within 20 days*



# Mileage Reimbursement

When driving your personal vehicle for UW business, you will be reimbursed for mileage. MapQuest or Google Maps are the official tools for determining the most direct route.

- Fewer than 100 miles roundtrip - Standard Rate
  - ✓ After 1/1/24: \$0.67 per mile
- More than 100 miles, a fleet vehicle should be used
  - ✓ <https://uwplatt.sharepoint.com/sites/AdministrativeServices/FacilitiesManagement/SitePages/Car-Fleet.aspx>
  - ✓ Provide fleet non-availability slip if no fleet vehicle is available
  - ✓ Exception – Trips to an airport (can't park fleet vehicles at the airport)
- More than 100 miles roundtrip without using fleet - Turndown Rate
  - ✓ After 1/1/24: \$0.43 per mile





# Individual Meal Per Diems

- Per Diem is an allowance provided for individual meals and incidentals. No receipts required. [Per Diem Calculation \(wisconsin.edu\)](https://www.wisconsin.edu/perdiem)
  - ✓ Amount varies by location
  - ✓ Provided for any overnight travel
  - ✓ Include conference documentation in expense reporting to indicate provided meals
- Day Trip Allowance is \$15 (taxable) and provided for day trips
  - ✓ No receipts required



# Tax Exemption

- Wisconsin

- ✓ The Wisconsin sales and use tax provides an exemption from payment of state, county, and local tax.
- ✓ Travelers seeking Wisconsin sales tax exemption for business lodging, meals, and vehicle rentals should present the Department of Revenue approved tax-exempt wallet card (***obtain your card from your institution's business office***)

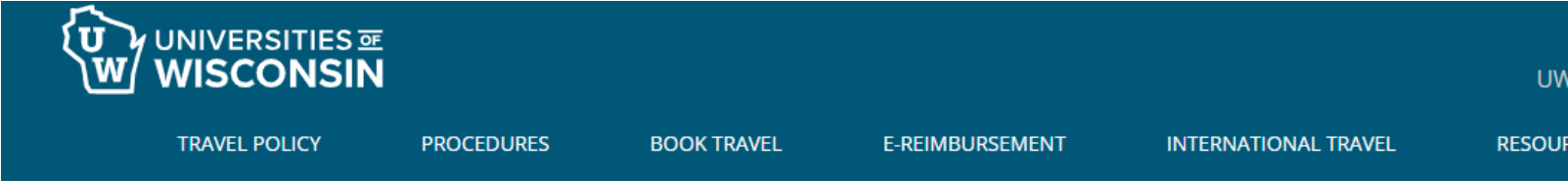
- Other States

- ✓ UW travelers may have various Sales and Use Tax Exemptions when making purchases other states. Review [TravelWise](#) for more details.

**\*If you are unable to receive exemption, make note of reason why on expense report**



# Concur



[University of Wisconsin System](#) / [Travel](#)



## Contact

### Travel Incorporated

**Dedicated**

**Agency Hours:**

M-F 7 AM to 8 PM  
CST

**Phone:** (877)

811-9898 or 470-  
589-2205

*Afterhours Emergency Sup  
24/7/365*

[Other Contracted Travel Ag](#)

### UW Campus Travel M

- Policy Assistance
- Booking Question
- Reimbursement Assistance
- Training

## Logins

[Concur Online Booking](#)

[E-Reimbursement Portal](#)

[Lodging, Meal & Incidental Per Diem Calculator](#)

[Travel Incorporated Portal](#)

## Travel News

### 2024 Mileage Rate

*January 2, 2024*

### Vehicle Rental Contract Update – Enterprise and Hertz

*December 20, 2023*

# What's new?

- New Enterprise/National Big 10 contract
  - Rates have increased and \$5 surcharge WI airports
  - Leisure use contract revised [Personal Use Contracts | Travel \(wisconsin.edu\)](https://www.wisconsin.edu/travel)
  - More fees for student renters
  - Hertz also primary
- Concur SSO
- American Airlines no longer preferred
- Workday changes, summer 2025
  - First/last day per diem adjustments
  - Raising required receipt amount
  - Missing cost comparison – 80% reimbursement



# Links

- [UW TravelWise Website](#)
  - [E-Reimbursement Login](#)
  - [Policies](#) (where to find)
  - [UW Platt travel website](#)
  - Travel News – [Newsletter Sign Up](#)
  - [Concur Login](#) & Demo
  - [Per Diem Calculator](#)
- *Expense Training 1/11/24 1:00pm*



Q&A

**Thank you!**

